LIBRARY JOURNAL

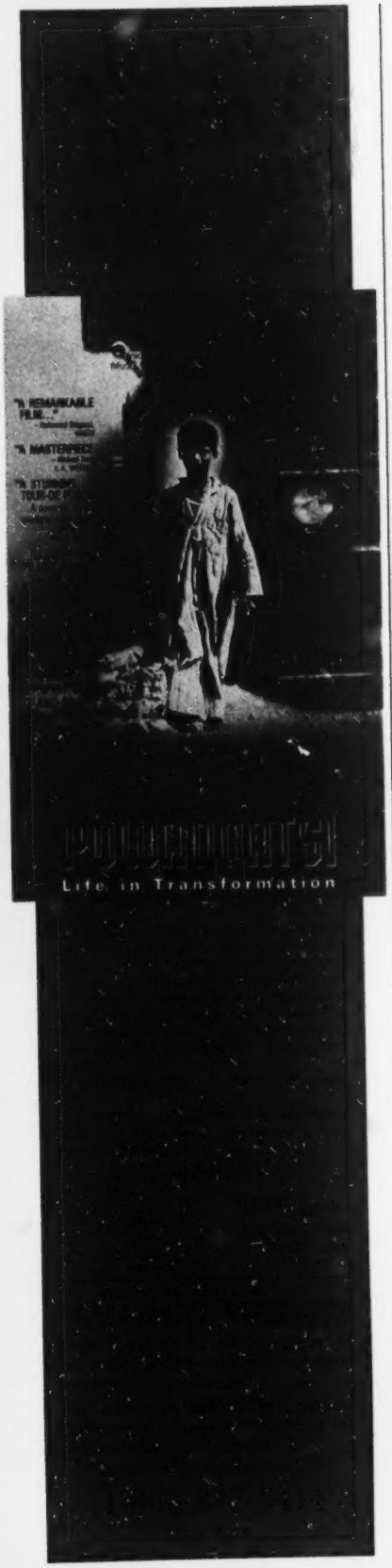
JULY 1990

A CAHNERS R.R. BOWKER PUBLICATION

Do Libraries Pay Fair?

Margaret Myers & Janice Feye-Stukas Fight Wage Discrimination

VIDEO DISTRIBUTION • LIBRARY LEADERS • FUNDRAISING



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PHOTOGRAPH BY ERIC SMITH

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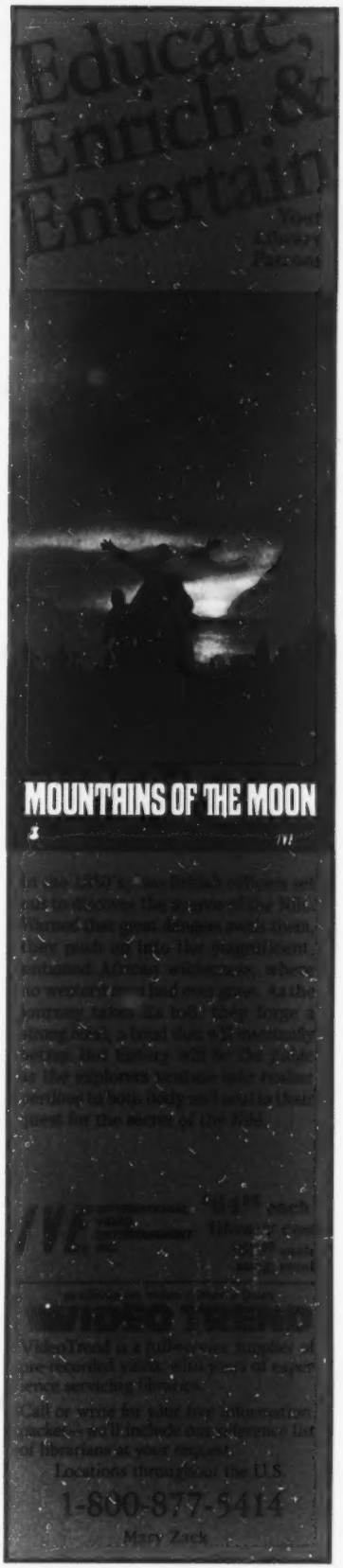


LIBRARY MARKET OUTLOOK

BY DEBORAH SELSKY

Compact Discs Now 26 Percent of Recorded Music Sales

Over the past three years, the recorded music industry has experienced a grand recovery from the stagnant growth of the early 1980s.

According to the Recording Industry Association of America, 800.7 million units of recorded music were shipped in 1989—a gain of 5.1 percent over 1988 totals and a new all-time high for units shipped. Manufacturers' revenues from sales of recorded music reached nearly $6.5 billion, up 3.4 percent above the year before.

Compact discs continue to be the recorded music industry's success story. For the sixth consecutive year, the majority of growth in recorded music shipments in 1989 stemmed from sales of compact discs. Since their introduction in 1983, compact disc sales have grown at a staggering pace. Last year, CD sales jumped 38.4 percent, blossoming into a $2.6 billion market.

LPs are fading away

Much as the cassette replaced the 8-track cartridge, the CD is quickly replacing the LP in consumer preferences. Dollar volume sales of CDs surpassed LPs in 1987, while unit volume sales topped LPs in 1988. In 1989, CD sales accounted for 26 percent of recorded music sales, up from 0.1 percent in 1983.

Meanwhile, the LP share of music sales dropped from 36.3 percent in 1983 to 4.3 percent in 1989. LP sales dropped steadily throughout the past decade. Last year, only 35 million LP records were sold, as compared to 322.8 million in 1980.

While only about 20 percent of all households have CD players, consumer spending on CDs and CD players is expected to continue to grow at a rapid pace. CD sales will prosper from both the new music market and the need to replace old music on LPs.

CD growth expected to continue

The advantages of the CD include superior audio quality and greater convenience. As prices of both CD players and the discs themselves decline, more consumers will make the investment into this new technology. Also, with the selection of LP records becoming scarce—many manufacturers have stopped producing LP records altogether—consumers will need to resort to other formats of music.

Libraries have found the greater durability of the CD a real advantage. This is offset by the fact that the small size of the discs makes them harder to protect from theft. Since the majority of library patrons do not yet own CD players, libraries buy a mix of cassettes and CDs that reflect community usage patterns.

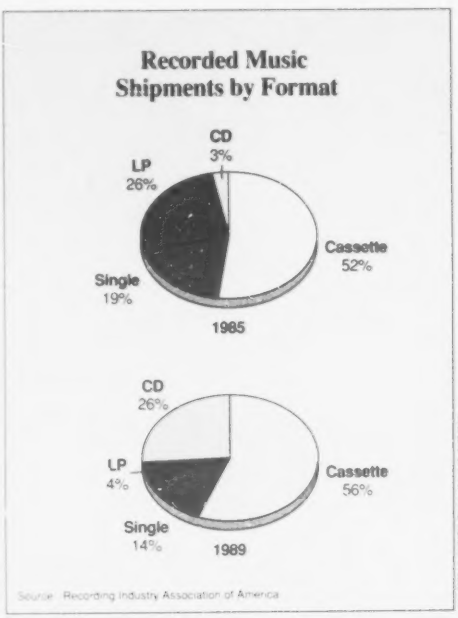


CHART BY ANNABELLE CARTER

Many have long since abandoned the less durable LP and this trend is increasing now that fewer LPs are available.

Cassettes still lead sales

While CDs are the fastest-growing recorded music format, cassettes remain the highest-selling format. Cassettes have accounted for at least 50 percent of recorded music shipments since 1984. In 1989, unit shipments slipped one percent to 446 million—the only decline the whole decade.

The low market penetration of the CD will allow cassette tapes to maintain their dominant position in the recorded music market for quite a few years.

Cassettes in trouble

Still, there are potential threats to the cassette market, namely recordable, erasable CDs and digital audio tape (DAT). Record companies, fearful that the introduction of DAT will reduce sales by providing a medium that permits high-quality taping of CDs, have thus far prevented the introduction of the DAT into the United States, although some have found their way in via the "gray market."

DAT hardware manufacturers and record companies have recently entered into an agreement on a copy-limiting system to prohibit unauthorized recording. Currently, record companies are pushing for legislation to mandate the use of this system in DAT recorders. With or without this legislation, the Electronics Industry Association expects the first DAT recorders to appear in stores later this year.

Unfortunately the DAT holds no advantages for libraries. Its sound quality is better, but since it is a tape medium, it is no more durable than analog cassettes. In addition, its smaller size makes it even more difficult to protect from theft.

Deborah Selsky is an economist with Cahners Economics, which provides industry analyses and forecasting services for the markets its magazines serve

Libraries use fundraising to help with operating costs but also to improve public relations

Public Libraries and

By Dwight F. Burlingame

BEFORE AND SINCE the first public library was established by tax dollars in this country in 1833,[1] private support has been a crucial element in public library development. Prior to this time, in fact for almost two centuries, private libraries and social libraries opened their doors for public use. One of the earliest public libraries so created was by bequest in the 1650s by Robert Keayne for a library in Boston.[2]

The public library movement was stimulated greatly by private philanthropy in the latter part of the 19th century. John Jacob Astor, James Lennox, Samuel Tilden, Enoch Pratt, and, of course, Andrew Carnegie were major benefactors to public libraries. Carnegie's gifts alone sparked the creation of over 1400 public library buildings. More recently, the Library Services and Construction Act (enacted in 1964) has been credited with being the major impetus for contemporary development. However, with the cut back of federal support in the 1980s, libraries once again sought greater support from private sources.

Some librarians may argue that public libraries should be suspect of private fundraising because it may suggest to the public that private dollars can replace crucial tax dollars, and, therefore, actually decrease library revenues.[3] But most librarians appear to view private fundraising efforts as a way to accomplish library goals and provide services that otherwise would not be possible. Private support supplements tax support to create a degree of excellence that otherwise would not be possible.

This view is consistent with America's capitalistic stance in which contemporary philanthropy is recognized as being primarily concerned with the improvement of life for all members of society. Public libraries represent an important informational, recreational, and cultural element in this "improvement-of-life" philanthropy. It is not surprising that the American Library Association's (ALA) Library Administration and Management Association (LAMA) division would be interested in finding out more about fundraising in public libraries.

The design of the study

In 1985, the Alternative Resource Development Committee of the Fund Raising and Financial Development Section (FRFDS) of LAMA conducted a survey of academic, public, and state libraries to determine the status of library fundraising in the United States. Results were reported by Fischler[4] and Burlingame[5] in the library literature. As a follow-up, the Survey Committee of FRFDS conducted a study of public libraries in fall 1989. (It is anticipated that a follow-up of academic libraries will be conducted in concert with the Office of Research of ALA and the Association of College and Research Libraries [ACRL] in the near future.)

A questionnaire was sent to a stratified random sample of public libraries, which was drawn from an earlier survey of public libraries reported by Lynch.[6] During 1988 the survey instrument was developed, tested, and revised. Many questions were the same as in the 1985 survey. However, by design, additional questions were added to try to measure more clearly the success of fundraising efforts when compared to goals, potential, and dollars spent on fundraising. Questionnaires were sent to 516 public libraries in October 1989. The first round yielded 296 responses. A follow-up survey resulted in another 98 responses with a total of 394 usable questionnaires returned by the cutoff date of December 19, 1990 (a response rate of 76.4 percent).

It was no surprise that the primary source of funding for the vast majority (over 95 percent) of public libraries was tax support. Only 15 libraries (3.8 percent) indicated that their primary support came from private sources. All 15 were libraries with budgets under $100,000.

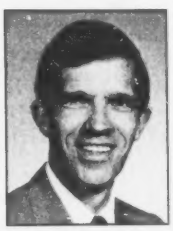
Slightly more than 44 percent of the respondents felt that fundraising was extremely or very important, while 29 percent felt fundraising was not very important or not important at all. Many librarians felt private fundraising was important because it helped the library meet special needs and gain valuable support.

However, several indicated their concern about maintaining tax support if they did private fundraising. One respondent wrote: "The library would be better served if it had a *tax-based* total support package. The fundraising is at best a very small part of the budget because it *cannot* be counted on." The perception of fundraising was not significantly different when analyzed by size of library. Interestingly, librarians working in libraries with budgets in the $500,000 to $2 million range viewed fundraising as less important than their counterparts in smaller or larger libraries.

So goes the nation

Do public libraries in different geographic regions view the importance of fundraising differently? In order to address this issue, the re-

Dwight F. Burlingame is Associate Director of Academic Programs and Research, Center on Philanthropy, Indiana University, Indianapolis. He served as chair of the Survey Subcommittee of the Fundraising Development Section of LAMA during the completion of the recent survey



Fundraising:

Not-So-Strange Bedfellows

Figure 1: Respondents to 1989 Survey of Fundraising During Past Four Years by Region (active/not active=269/125)

LISA HILGERS

Table 1: Purposes for Funds Raised*
(n=269)

	Regional Breakdown				
	All	NA	GL&P	SE	W&SW
General operations	22.3%	38.8%	14.3%	16.2%	8.8%
Equipment	54.3	50.0	57.1	59.5	54.4
Capital construction	29.4	26.5	23.4	48.6	29.8
Books/materials	63.2	57.1	63.6	70.3	68.4
Special programs	43.9	36.7	46.8	43.2	52.6
Other	12.6	12.2	13.0	16.2	10.5

* Because respondents could check more than one item, percentages exceed 100%

spondents were first divided into four major regions—North Atlantic, Great Lakes and Plains, Southeast, and West and Southwest (Figure 1).

Respondents by region placed little difference on the importance of fundraising, except for the libraries in the Great Lakes and Plains and the Southeast that did not consider fundraising as important as librarians in the North Atlantic and West and Southwest regions. This may be partially explained by public funding levels varying by region, by attitude toward private support for public libraries, or other factors not identified in this study.

Of the 269 librarians (68.3 percent) that indicated that their libraries were involved in fundraising in the last four years, 235 respondents indicated individuals were contacted and 181 indicated businesses were contacted. Governmental organizations and outside foundations each received 95 responses. This is consistent with national fundraising statistics that indicate individuals represent the greatest source of support of dollars for nonprofit organizations. Of the 44 who indicated other publics contacted, the vast majority were local service clubs and community groups such as Lions, Rotary, the American Association of University Women (AAUW), etc.

In reviewing the data by region, a couple of trends appeared; libraries in the Southeast contact businesses, governmental organizations, and outside foundations more frequently than their counterparts in the other regions.

Direct person contact is considered by experts to be the best method of fundraising. Sixty-seven percent of the public libraries used this technique; direct mail was used by 61 percent; special events by 40 percent; telephone solicitation by 28 percent; and 14 percent used other techniques such as newspaper, radio publicity, posters, and contact at library book sales.

No. 1: The book sale

The most common type of fundraising event is still the library book sale. One hundred and six libraries used this technique for their last

event, which represented 39 percent of all respondents.

Special events and programs have been used by public libraries for a long time as a means of attracting public support: from exhibits, story hours, lectures, films, book clubs, musical events to more recently video clubs, restaurants, computer labs, specialty shops and fee-based services—all with an eye to building a broader public base and to making the library an attractive and vital component of the local community.

These activities still rank high in the total picture of a library's fundraising component. Over 25 percent of the libraries used this method in their last fundraising appeal. Other sales, membership drives, capital campaigns, and annual campaigns made up the majority of the remaining methods employed in the library's latest fundraising event. Of the 149 libraries that had more than one fundraising event in 1988 or 1989, over 75 percent had between two and four. Only ten (6.7 percent) libraries had more than ten events in 1988 or 1989.

When asked to respond to what percentage of funds raised by your last event came from individuals, businesses, governmental organizations, outside foundations, or other, the clear majority credited individuals with the highest percentages. Over 111 respondents (48.7 percent) indicated 100 percent came from private individuals. Businesses represented the next most frequent source of dollars with "other" sources next. Governmental organizations and outside foundations had an equal number of respondents with 28 libraries each seeking funds from those sources.

Typical of responses by librarians about the role individuals and businesses play in their fundraising is the following: "The Friends of the Library sold engraved tiles to pave the lobby of a new library. Public response was very enthusiastic . . . and our library has a permanent reminder of the many individuals, businesses, and groups who supported us." Some libraries, particularly smaller ones, which sought grants for a capital campaign, tended to emphasize requests from governmental bodies and local foundations. One librarian responded: "We could never have raised enough through appeals to individuals, book sales, bake sales, etc., to build an addition on to our building." Clearly, the nature of the appeal and the local situation must influence the choice of the prospective donor.

The hows, the whys, the "whatfors"

In the last four years, what did the libraries raise money for? "Books/materials" was cited the most often with "equipment" a close second. "Special programs," "capital construction," and "general operations" and "other" followed in rank order (see Table 1). When analyzing the data by region, a significant difference was found in general operations and capital construction between regions.

Many respondents indicated the nonmonetary benefits of fundraising to be more important than the dollars raised. One librarian wrote: "Although the funds are useful to the library, the primary benefit is public support and public relations, not fundraising." Or as another librarian put it, "Many events raise money, but are run more for prestige and community support than just fundraising." And finally, this librarian's comment was quite revealing: "I see the Friends more as a lobbying effort than as a source of desperately needed funds."

Library development has seen an increase in the use of professional staff for fundraising. Slightly less than 54 percent of the respondents indicated library staff did most of the fundraising. However, volunteers continue to be important. In fact, most libraries have developed volunteer support groups in the form of "Friends" groups. Just under 56 percent of the respondents indicated Friends did most of the fundraising. "Board of Trustees" was checked 33.8 percent of the time and "other volunteers" was checked 19.3 percent of the time. Only one library indicated a paid external professional did most of the fundraising in the last four years.

When analyzing the data by region it was discovered that librarians in the Southeast more often did "most of the fundraising" when compared to their counterparts in the other regions. Friends were used less often in the Southeast. Boards of Trustees were used much more often in the North Atlantic region than the rest of the country. Perhaps this reflects the longer and more established role of boards in this part of the country.

Fundraising and existing budgets

There was no significant difference between size of budget and importance attributed to fundraising. There was a significant difference between perception of amount raised vs. potential by size of library, i.e., librarians from smaller institutions ranked the amount raised vs. potential as more successful than larger libraries. As might be expected, larger libraries raised more money per event.

The questions that asked the degree of amount pledged vs. amount received were so seldom answered that no analysis could be made. It is clear that most public libraries do not conduct pledge campaigns or simply do not keep the results.

Where does this leave fundraising?

It appears clear that a growing number of public libraries are engaged in private fundraising. Not only for the purposes of helping out on operating costs, special projects, and buildings, but also geared toward improving public relations and educating the public about the unmet financial needs of the library. As one librarian put it: "[our campaign] . . . is not only directed at raising cash, but also directed at earning 'brownie points' with local government funding bodies who appreciate the library's attempt to raise a portion of its requested budget increase from nontax sources."

On behalf of the Survey Committee and LAMA, special thanks are expressed to the respondents in this study. Without their participation, important information would not be shared. With the establishment of the Fundraising Clearinghouse at ALA Headquarters, many librarians will be able to take advantage of their colleagues' experiences in the area of library development and thereby, in the final analysis, improve library service to their constituents.

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2. *Ibid.*, p. 19.
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4. Fischler, Barbara F., "Library Fund-Raising in the United States: A Preliminary Report," *Library Administration and Management*, Jan. 1987, p. 33-34.
5. Burlingame, Dwight F., "Library Fundraising in the United States: A Second Look," *Library Administration and Management*, Jun. 1987, p. 108-111.
6. Lynch, Mary Jo. *Non-Tax Sources of Revenue for Public Libraries*. ALA, 1988.

CALENDAR

Institute on Federal Library Resources, Dun & Bradstreet Online Training Sessions, 1990 Pacific Northwest LA Conference

JULY

23-27—The Cammp Show, Expo-Center/Downtown, Chicago. Exposition and seminar program for professionals involved with computer graphics–aided multimedia and presentations. **September 10-14**, Jacob K. Javits Convention Center, New York. **February 11-15, 1991,** Civic Auditorium, San Francisco. Contact: Debbie Rotolo, Knowledge Industry Publications, Inc., 701 Westchester Ave., White Plains, NY 10604; 914-328-9157; outside NY, 800-248-KIPI.

23-August 3—Institute on Federal Library Resources, Washington, D.C. Sponsored by Catholic University of America, School of Library and Information Sciences. Curriculum will identify the role of federal libraries, information centers, and data banks in the federal library community; discuss the implication of the National Commission on Libraries and Information Science's posture as related to federal libraries; identify resources available through major government clearinghouses; compare the in-operation or the in-process development of the major federal library. Contact: SLIS, Catholic Univ. of America, Washington, DC 20064; 202-635-5085.

26—Dun & Bradstreet Online Training Sessions, Washington, D.C. Free. **August 8**, Northern New Jersey; **August 14**, Denver; **August 16**, Anaheim, CA; **August 21**, Cleveland; **August 23**, Detroit. Seminars are on first come, first served basis. 800-233-1026.

AUGUST

15-18—1990 Pacific Northwest Library Association Conference, Lloyd Center Red Lion, Portland, Oreg. Theme: "PNLA on the Pacific Rim." Speakers: Maxine Hong Kingston, author of *Tripmaster Monkey*; Dr. Robert Knapp, president of the Washington Council on International Trade. Contact: Dr. Jan Fortier, Local Arrangements Chair, Portland State University, Box 1151, Portland, OR 97207.

SEPTEMBER

19-22—Midcontinental and Pacific Northwest Chapters Medical Library Association, Seattle. Theme: "Coming of Age in the 21st Century." Contact: Kerry Skidmore, HCA St. Mark's Hospital, Library Services, 1200 E. 3900 S., Salt Lake City, UT 84124; 801-268-7004.

25-28—Association of Research Libraries, Office of Management Services Basic Management Skills Institute, Philadelphia. Contact: OMS, ARL, 1527 New Hampshire Ave. NW, Washington, DC 20036; 202-232-8656.

OCTOBER

6—The 1990 National Storytelling Festival, Mill Spring Park, Jonesborough, Tenn. Guest storytellers include: The Folktellers, Ray Hicks, Louis Killen, Ed Stivender, and Luisah Teish. Preregistration is encouraged. Admission: $5 for adults, $4 for children, free for children 6 and under. Group and family rates available. Contact: National Association for the Preservation of Storytelling, PO Box 309, Jonesborough, TN 37659; 615-753-2171.

17-19—The Online Audiovisual Catalogers Conference, Holiday Inn Rochester South, Rochester, N.Y. Theme: "Technology: Friend or Foe?" Registration fee: $65 for OLAC members; $75 for nonmembers; after August 15 add an additional $10. Contact: Sheila Smyth, Lorette Wilmot Library, Nazareth College of Rochester, PO Box 10996, Rochester, NY 14610-0996; 716-586-2525, x455.

NATIONAL/ INTERNATIONAL

American Association of Law Libraries: New Orleans, Jul. 21-24, 1991.

American LA: Midwinter: Chicago, Jan. 12-17, 1991.

American Society for Information Science: Toronto, Nov. 4-8

Asian Pacific Special and Law Librarians: Adelaide, Australia, Aug. 6-11.

ACRL Rare Books and Manuscripts Section: Cambridge, England, Sept. 5-8.

British LA Conference and Exhibition: Brighton, United Kingdom, Sept. 4-7.

Guadalajara International Book Fair: Guadalajara, Mexico, Nov. 24-Dec. 2.

International Congress on Medical Librarianship: New Dehli, India, Sept. 24-28.

International Federation of Library Associations and Institutions: Stockholm, Sweden, Aug. 18-24.

Library and Information Technology Association: Denver, Sept. 13-17, 1992.

Music Library Association 60th Annual Conference: Indianapolis, Feb. 13-16, 1991.

Society of American Archivists: St. Louis, Oct. 25-29.

Special Libraries Association: San Antonio, Tex., Jun. 8-13, 1991.

White House Conference on Library and Information Services: Washington, D.C., Jul. 9-13, 1991.

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